YEAR-END 2024-2025 TO-DO LIST FOR CSI POWER USERS

As always at the end of the year, CSI Lawyer will require a couple of actions from the power users. Please check the below to-do list for any actions that may be necessary in your organization.

Number series

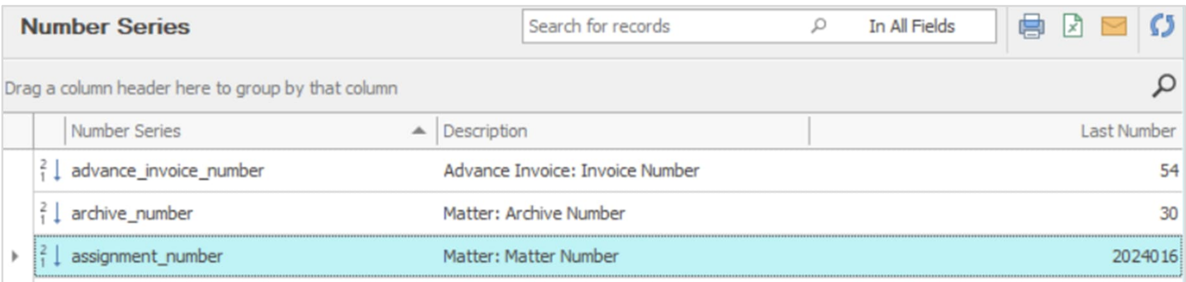
Does your office use number series which include a year?

NOTE! **Do not change the number series for invoices until you have created ALL invoices you wish to register for 2024.** When the Last Number field has been updated with a new value, you won't be able to return to the old number series as the new value must always be greater than the previous one.

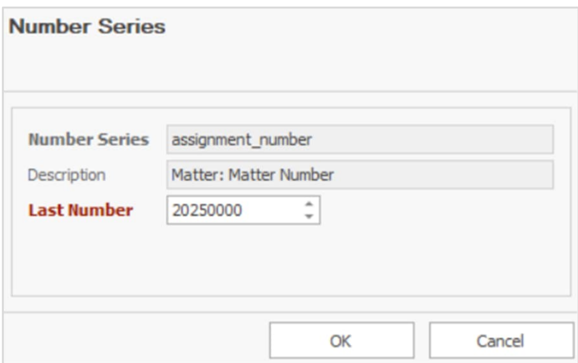
When you wish to start using the year 2025 number series, please update the value in the Last Number field of each number series.

Update the number series as follows:

1. Go to the Settings > Common Settings > Number Series.
2. Open one of the number series, for example the Matter number.



3. Enter 20250000 in the Last Number field if you wish the next assignment that is opened in CSI to have the number 20250001.



4. Repeat this for all the required number series.

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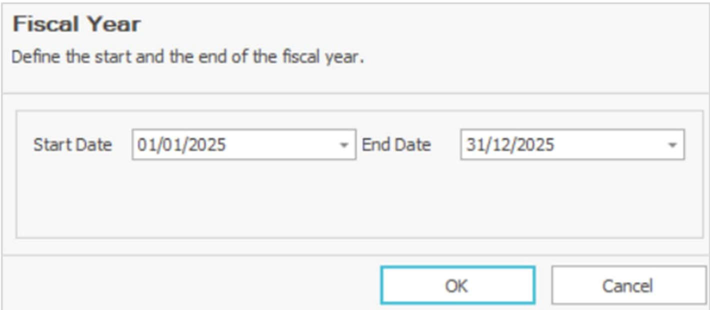
Adding a new fiscal year and closing the old one

Does your office use a calendar year as the fiscal year?

To be able to create invoices and register payments you need to add a new fiscal year for 2025. This also ensures that all dashboard charts are displayed properly.

1. Go to the Settings > Financial / Fiscal Years
2. Select New.
3. The start and end dates of the fiscal year 2025 are filled in automatically.



4. Confirm by selecting OK.

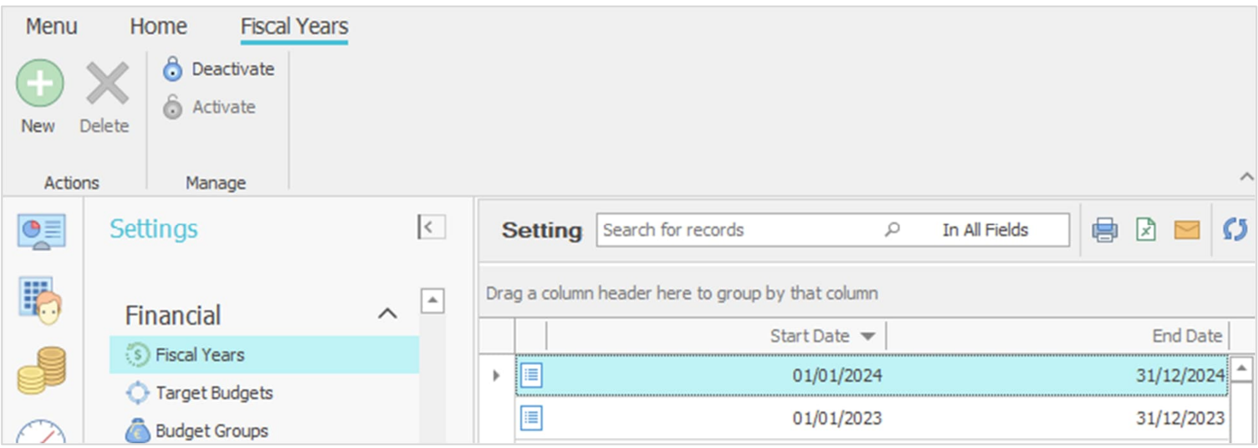
Should the old fiscal year be closed?

If your office closes individual fiscal periods within fiscal years, we also recommend locking the entire old fiscal year.

NOTE! Do not close the fiscal year 2024 until you have registered ALL the invoices and payments for it. However, you can reopen the fiscal year if required.

You can close the fiscal year as follows:

1. Go to the Settings > Financial / Fiscal Years folder.



2. Click on Deactivate (or right-click on the row and select Deactivate).
   - If there are open fiscal periods within the fiscal year, they will be locked simultaneously.

If you reopen a locked fiscal year, the fiscal periods within it will remain locked. They must be opened separately by first opening the fiscal year and then activating the required fiscal periods within the year.

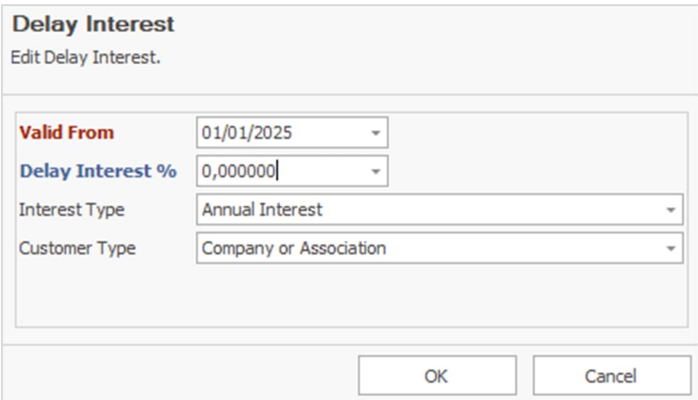
Defining a delay interest

Does the delay interest change on 1.1.2025?

If required, update the new delay interest in the Settings. Define the delay interest separately for Companies and for Private Persons. If your company has several business units, these changes must also be made separately for each business unit. The previous delay interest is automatically deactivated as soon as the new delay interest becomes valid.

You can define the new delay interests as follows:

1. Go to the Settings > Organization / Business Units.
2. Open the desired business unit by double-clicking it.
3. Select the Delay Interests folder.
4. Add a new delay interest by clicking the New button.



5. Add the date 1.1.2025 to the 'Valid From' field and define the new delay interest as well as the other details. Confirm by selecting OK.

If there are additional changes to the delay interest during the year 2025, you can add them by following these same instructions.

Updating the expense types

Does your office use expense types?

If required, update the unit prices for the expense types. Please check, for example, the mileage fee and the daily allowances for the year 2025 from your local tax authority.

1. Go to the Settings > Common Settings > Expense Types.
2. Select the expense type to be updated by double-clicking the row.
3. Update the required information and confirm by selecting OK.

Hour prices, cost prices, and budgets

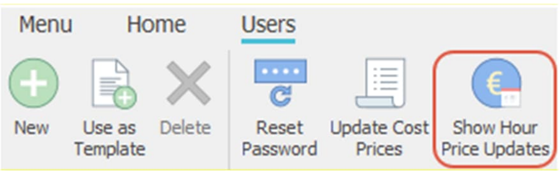
Also remember to edit the hour and cost prices of your users and, if required, update the cost prices for the remaining 2024 transactions. If your office uses budgets in CSI, it’s also time to create new budgets for the budget groups and/or individual users.

If you wish to check the pricing defined for your customers, the software offers a couple of useful reports (in the Financial Reports folder):

- **Prices Defined for Matters**
- **Prices and Discounts Defined for Customers**
- **Prices Defined for Customers** (if you still use version 10.1 or older)

Matter-based pricing can also be checked by selecting the matter and the Matter Pricing report which is available on the matter ribbon behind the Reports button.

If you’re using CSI Lawyer version 12.1, you can update the hour prices of users in advance with the new Hour Price Update function. The function can be found under Settings > Users behind the “Show Hour Price Updates” button.



Should you have any questions regarding these instructions, please contact the CSI support at help@csihelsinki.fi.

We wish you all the best for the year 2025!